JLLIS Joint Lessons Learned Information System

Issue Resolution Process

WTJSC 11-2 Update

ISSUE RESOLUTION REQUIREMENTS

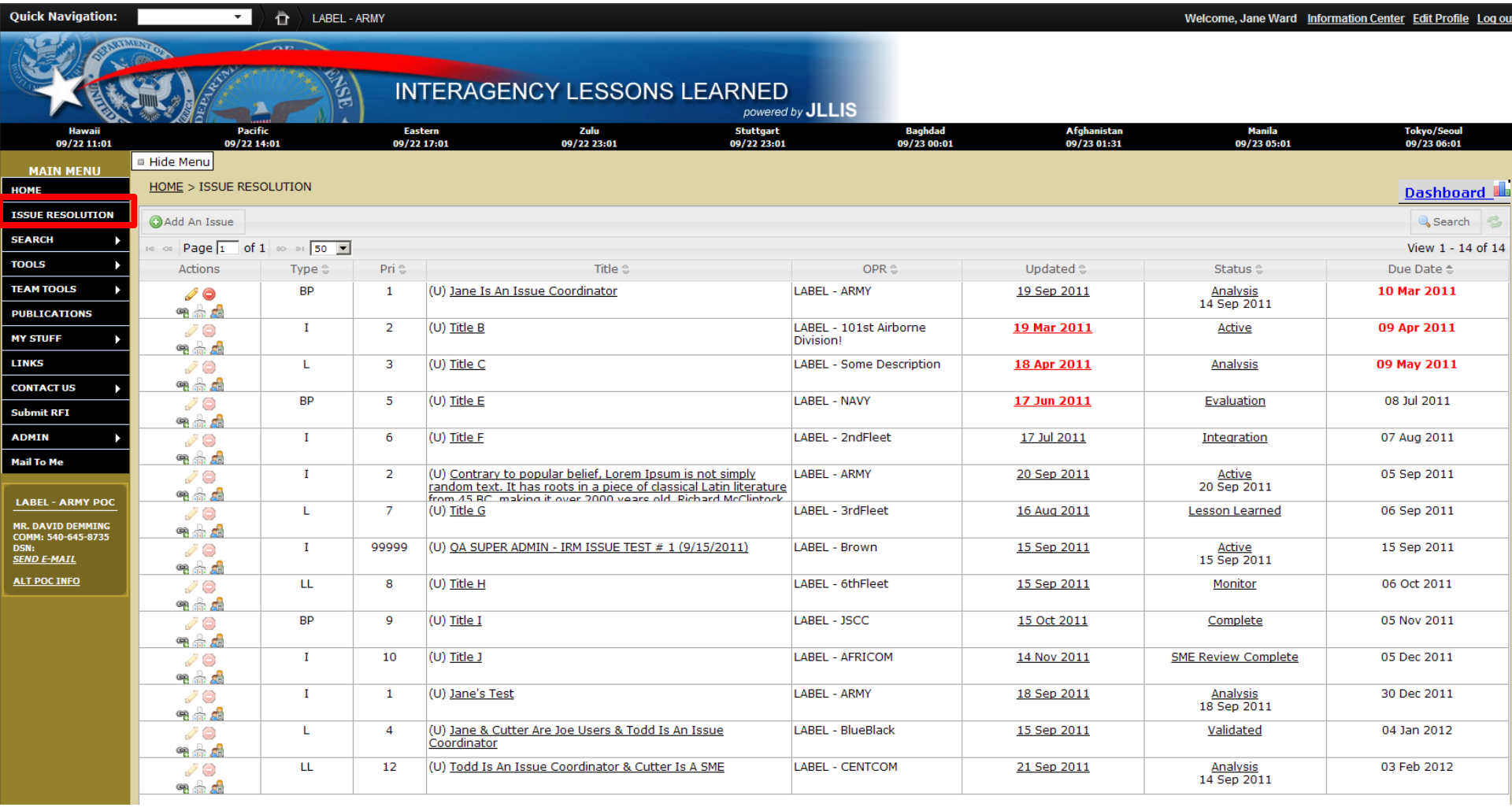
- **Oct 2011: v2.3 Issue Resolution Capabilities**
  - CMT #7917 - Create an Issue Resolution/Management Module
    - Add Type column to the Lesson Management interface (Best Practice, Issue, Lesson, Lesson Learned)
    - Display the Lesson ID # (hyperlink that when selected displays the Lesson Summary page)
    - Display the Lesson Topic text
    - Display the Event Date (Date the observation, issue, lesson was entered in JLLIS)
    - Provide Lesson Manager the ability to Add the OPR and OCR for an observation/issue
    - Display the OPR with organization Lesson Manager(s) POC contact information pop-up
    - Display the OCR(s) with Organization information pop-up to display the OCRs assigned
    - Display the assigned SME(s) with POC contact information in a popup
    - Display the Last Modified Date (with the POC information for Last Modified By in a popup)
    - Display the Status with date of status change
    - Display the Due Date (for those statuses with a Due Date)
  - CMT #9857: Email notifications
  - CMT #9833: Dashboard Views
  - CMT # 9827: My Stuff - Add a link to show issues assigned to logged in SME.
    - The page displays just those issues assigned to the Logged in user (SME).
    - Provide the SMEs the ability to view all Issues (read-only) assigned to their organization as well.

ISSUE RESOLUTION REQUIREMENTS

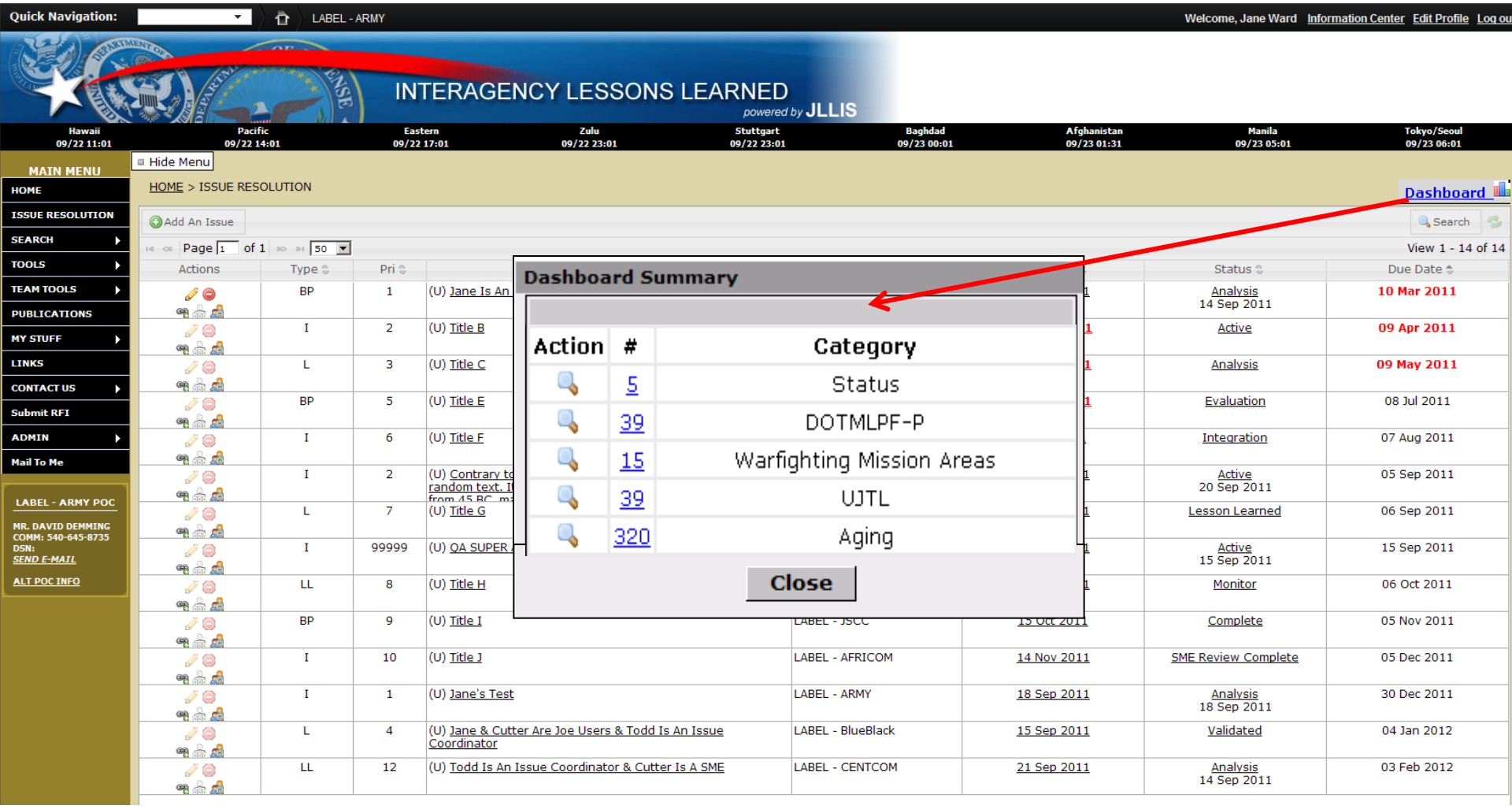
- **Jan 2012: Major v2.3.x Issue Resolution Capabilities**

- Issue Approval Process Workflow.
- CMT#9799: Provide ability to link an issue to a Binder/CoP
- CMT#9800: Allow the Admin to set the "specified timeframe" for last modified by field (30, 60, 90 days) before any notifications are sent to Issue Coordinators.
- CMT#9801: Provide the ability to “inherit” higher headquarters Last Modified email notification attributes (30, 60, 90 days) to component organizations (allow additional edits, as required).
- CMT#9802: Issue Resolution: Generate automatic Last modified email notifications based on organization settings. (Issue Coordinators get the email)
- CMT#9803: Generate Issue web page chart views
- CMT#9805 : Provide the assigned SME the ability to reject/decline the assignment, User must enter comments/reason behind why they are not the right SME. System sends an email notification to the Issue Coordinator with the SME comments included, as well as SME contact information.
- CMT#9807: Issue Subscription: Allow users the ability to subscribe to issues so they receive updated emails/information. From the Issue Summary page (Grid). Provide checkbox - real-time or every 24 hrs.
- CMT#9809: Include ability to view "linked" observations in the Issue Resolution Metric view. Allow user to select to view #'s by Issue tags or to include "Linked" data tags.
- CMT#9810: Issue Resolution: Provide ability to export to .ppt, .doc, .pdf, and .xls (thread)
- CMT#9813: Create Issue from an observation edit page. Opens the New Issue page with the observation linked to the issue.
- CMT#9843: Issue Resolution: Allow the organization Admin to set how often the system sends out an email reminder when an issue has had not action within the specified timeframe.
- CMT#9844: Provide users the ability to select which data to output when generating reports
- Canceled/Closed issues should not appear in the active (default) Issue Management Table; however, the user will have the ability to select to include those statuses (Canceled/Closed) from a drop down list to display all “canceled” or “closed” issues.

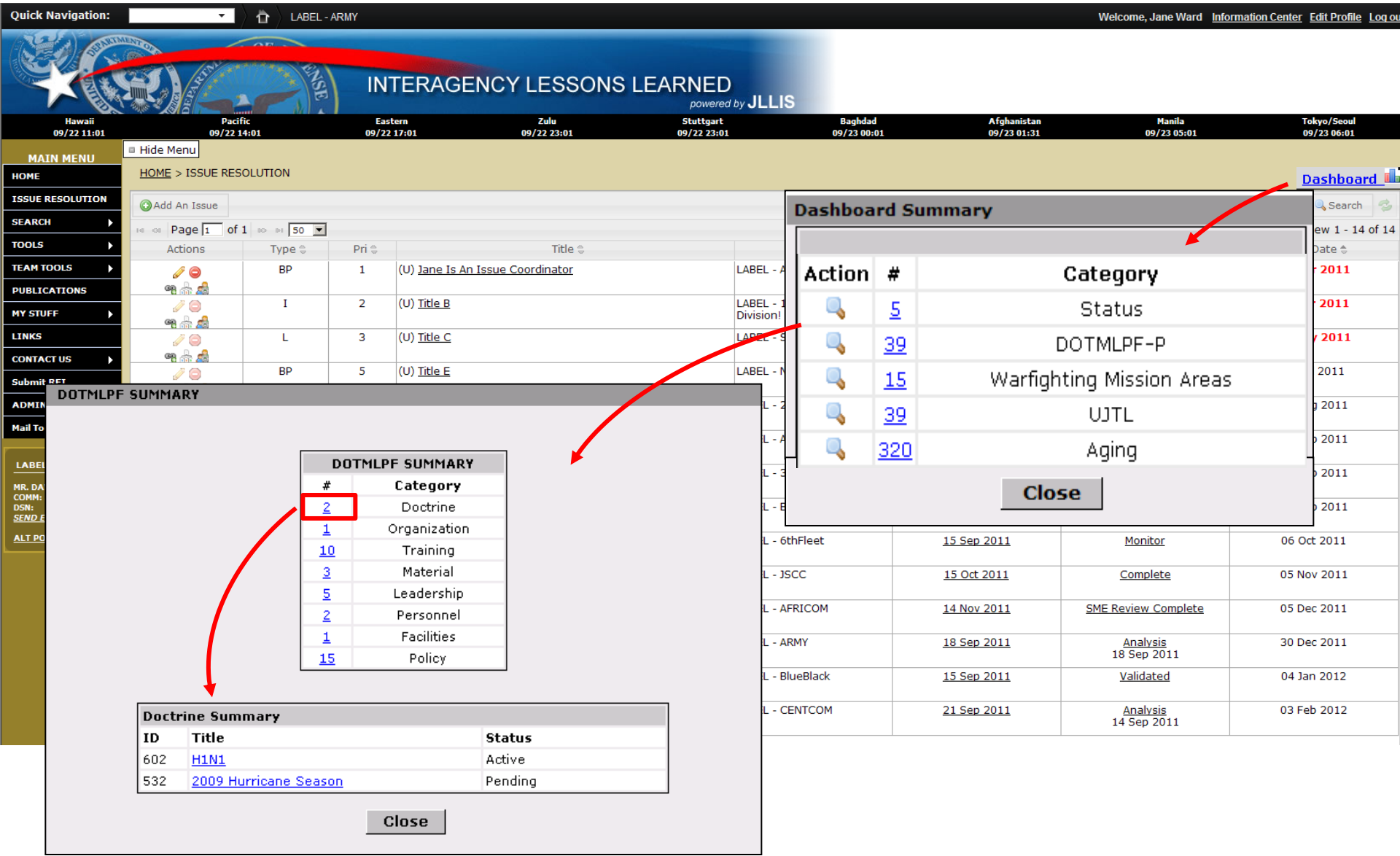
JLLIS Issue Management



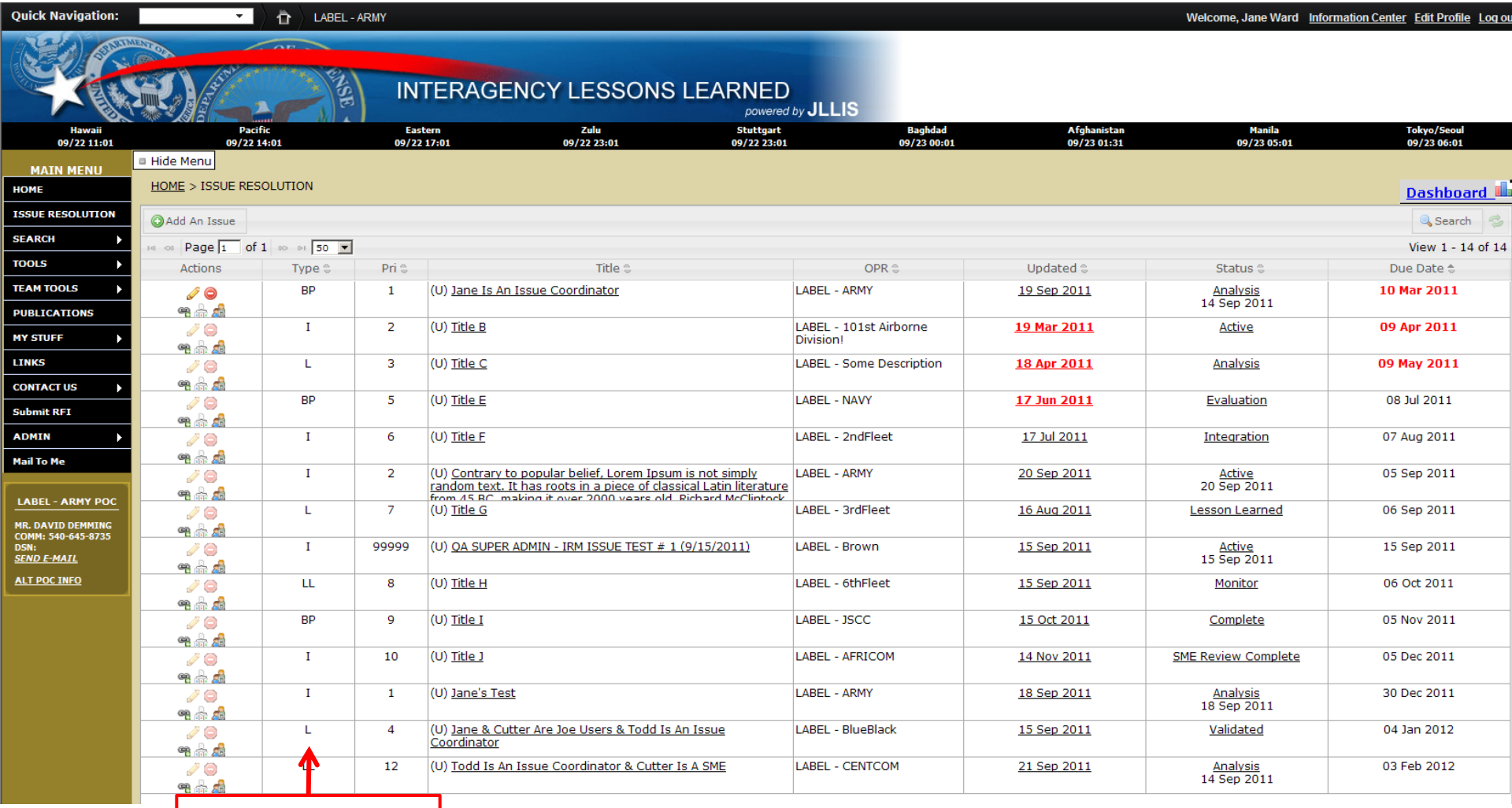
JLLIS Issue Management



JLLIS Issue Management



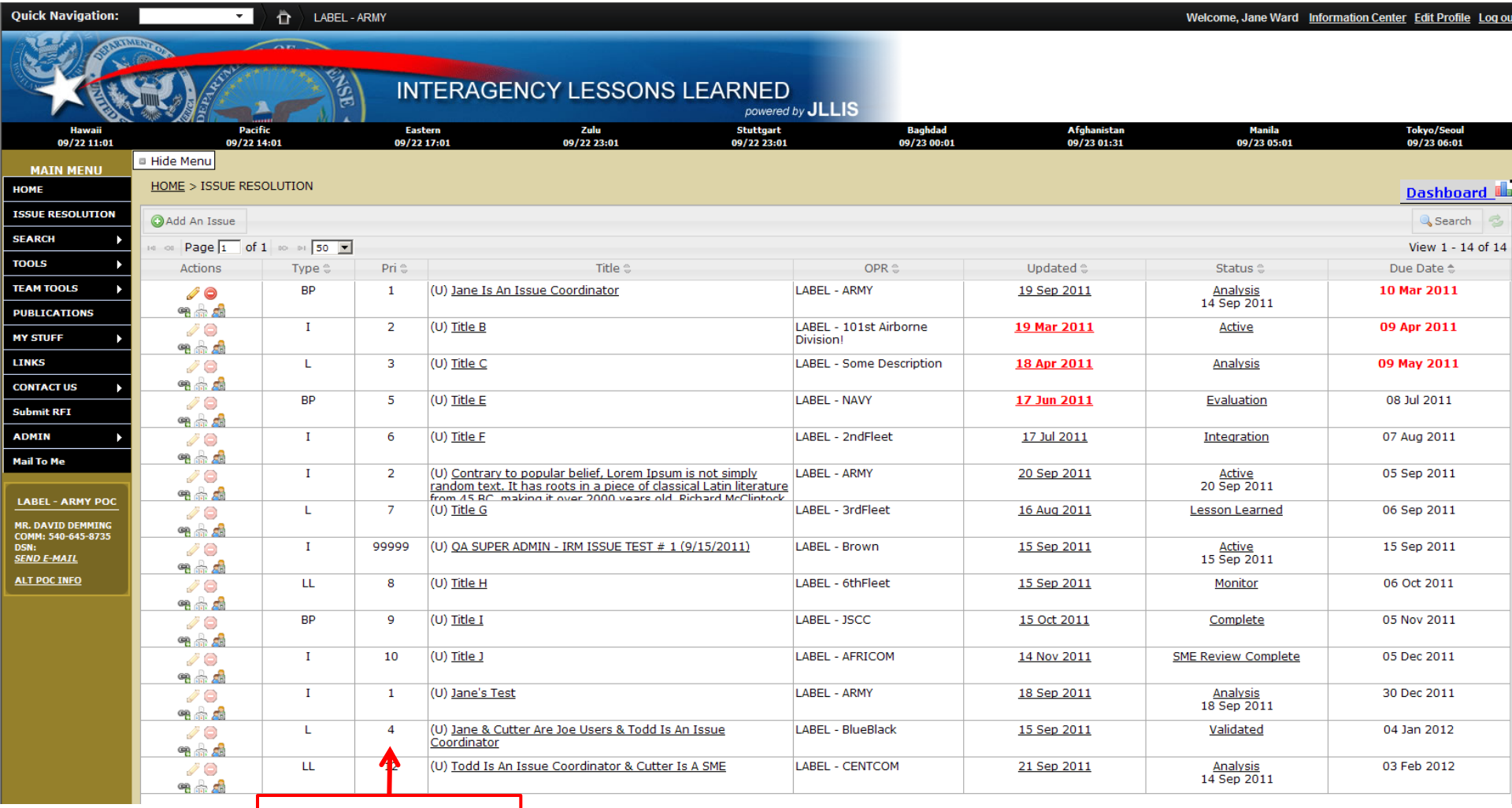
JLLIS Issue Management



Lesson Types

BP: Best Practice
I: Issue
L: Lesson
LL: Lesson Learned

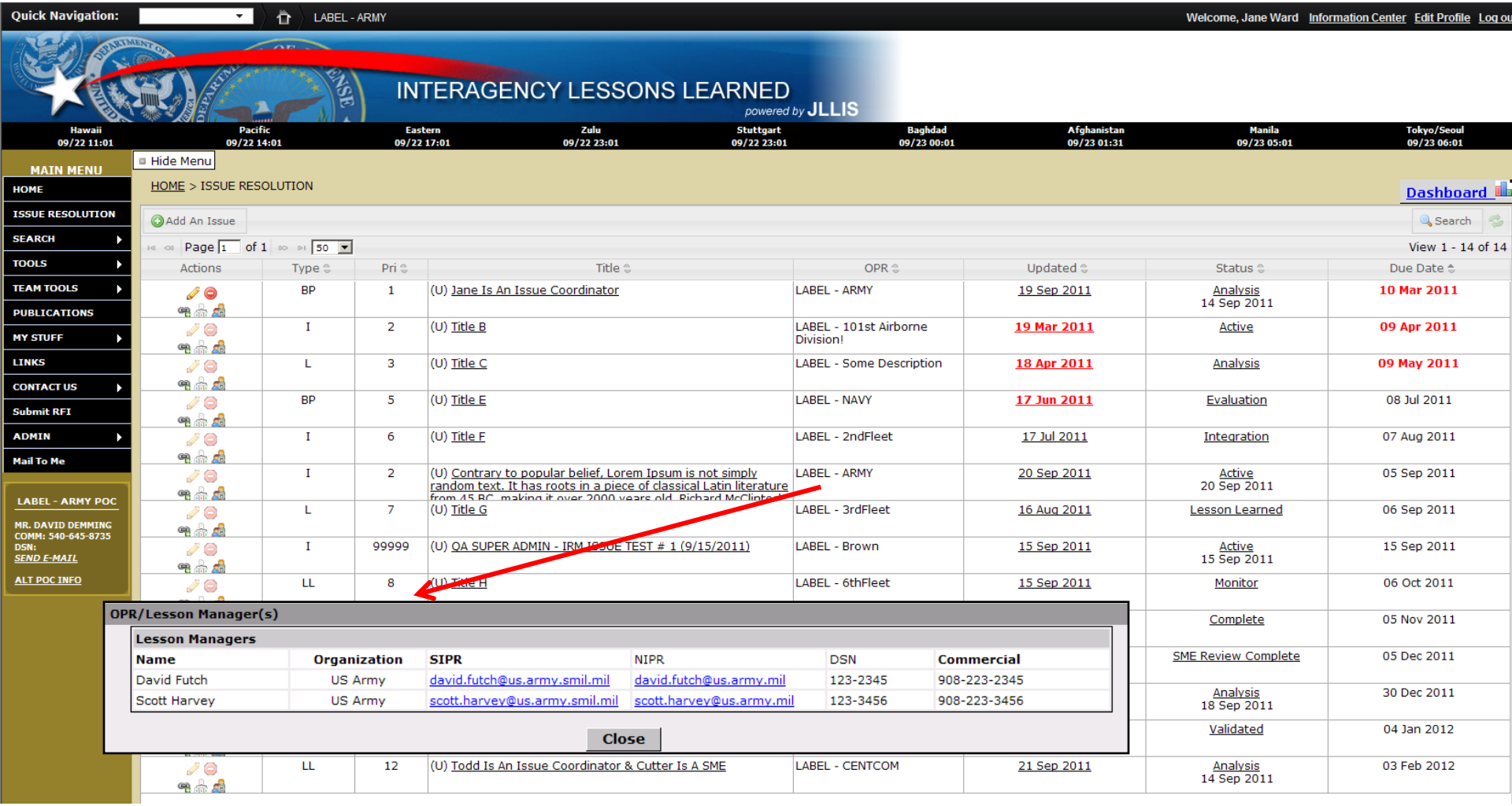
JLLIS Issue Management



Priority

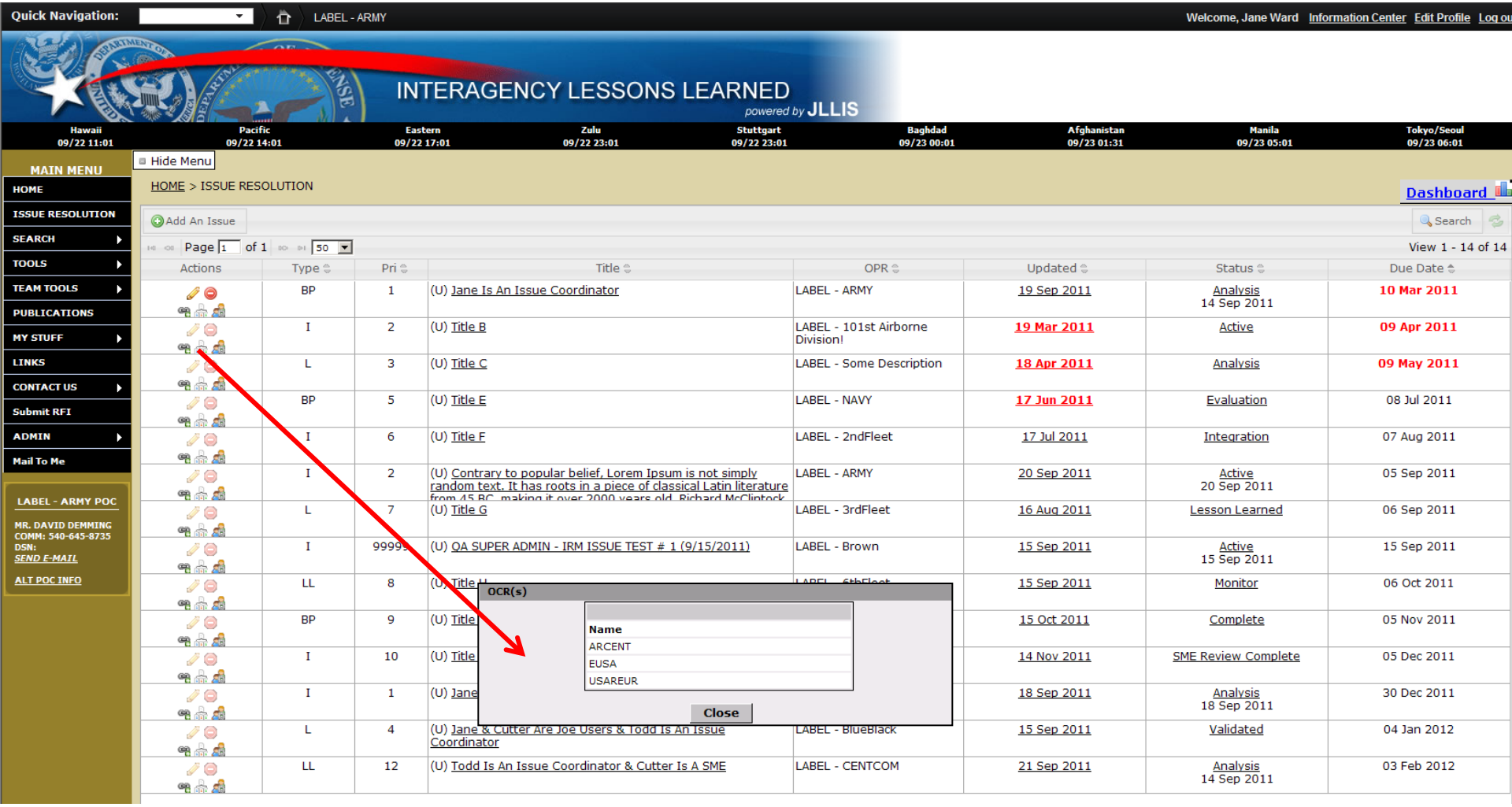
Displays the priority set on the Add/Edit Issue page. This is a read-only display.

JLLIS Issue Management



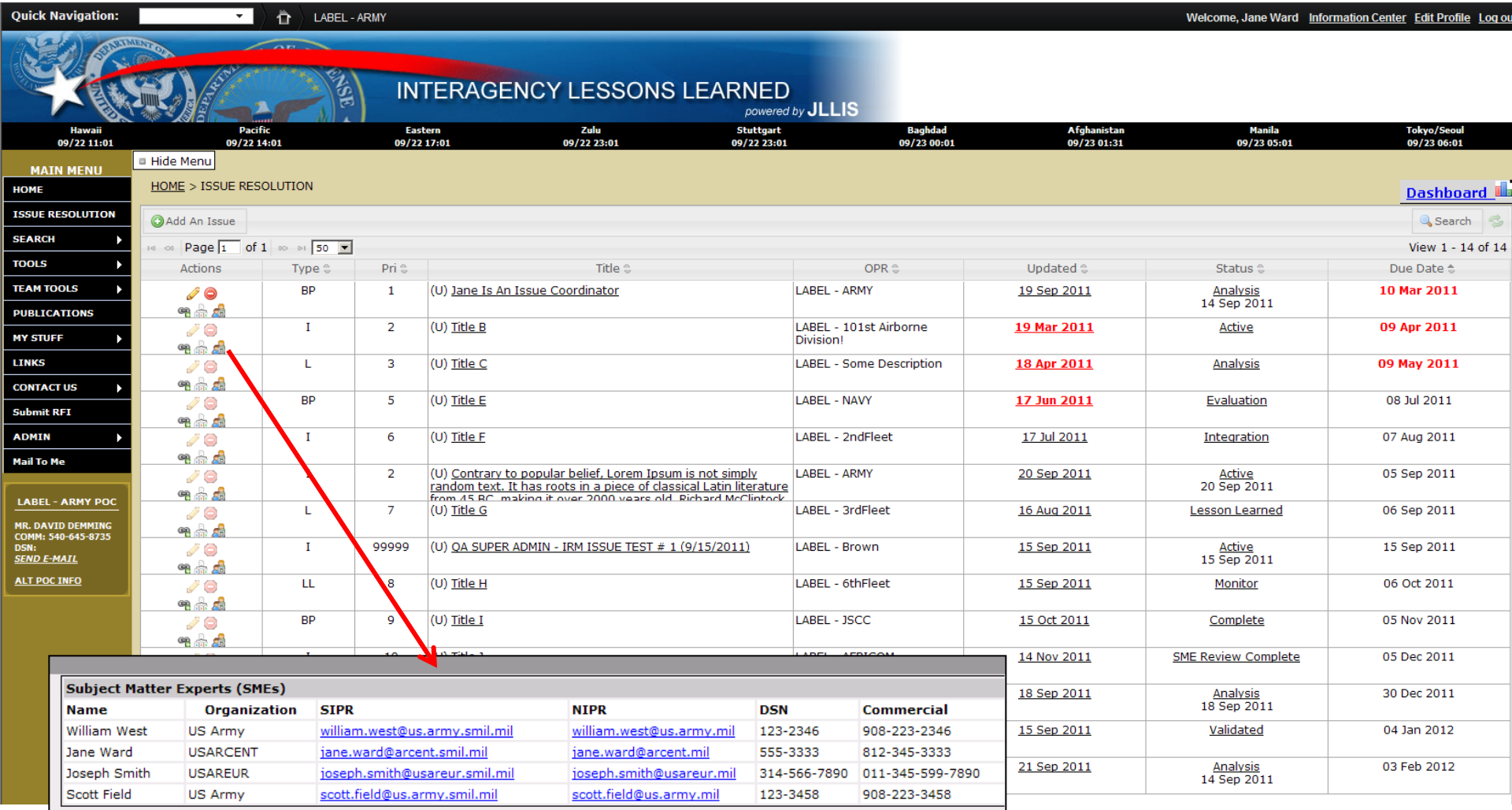
Displays the Organization/Office of Primary Responsibility as well as the assigned Lesson Managers for the selected OPR.

JLLIS Issue Management



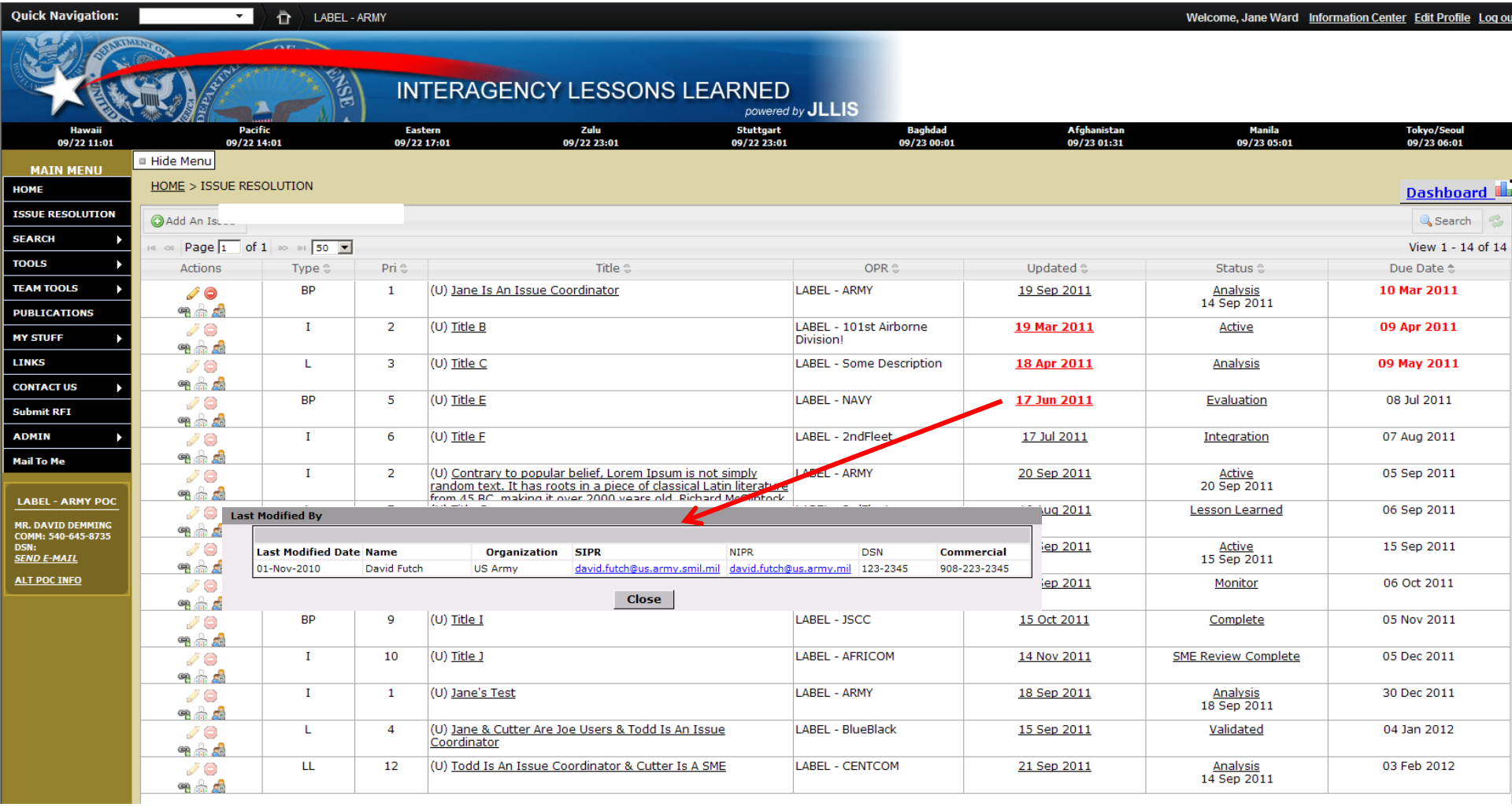
Displays the list of OCR(s) assigned to the issue.

JLLIS Issue Management



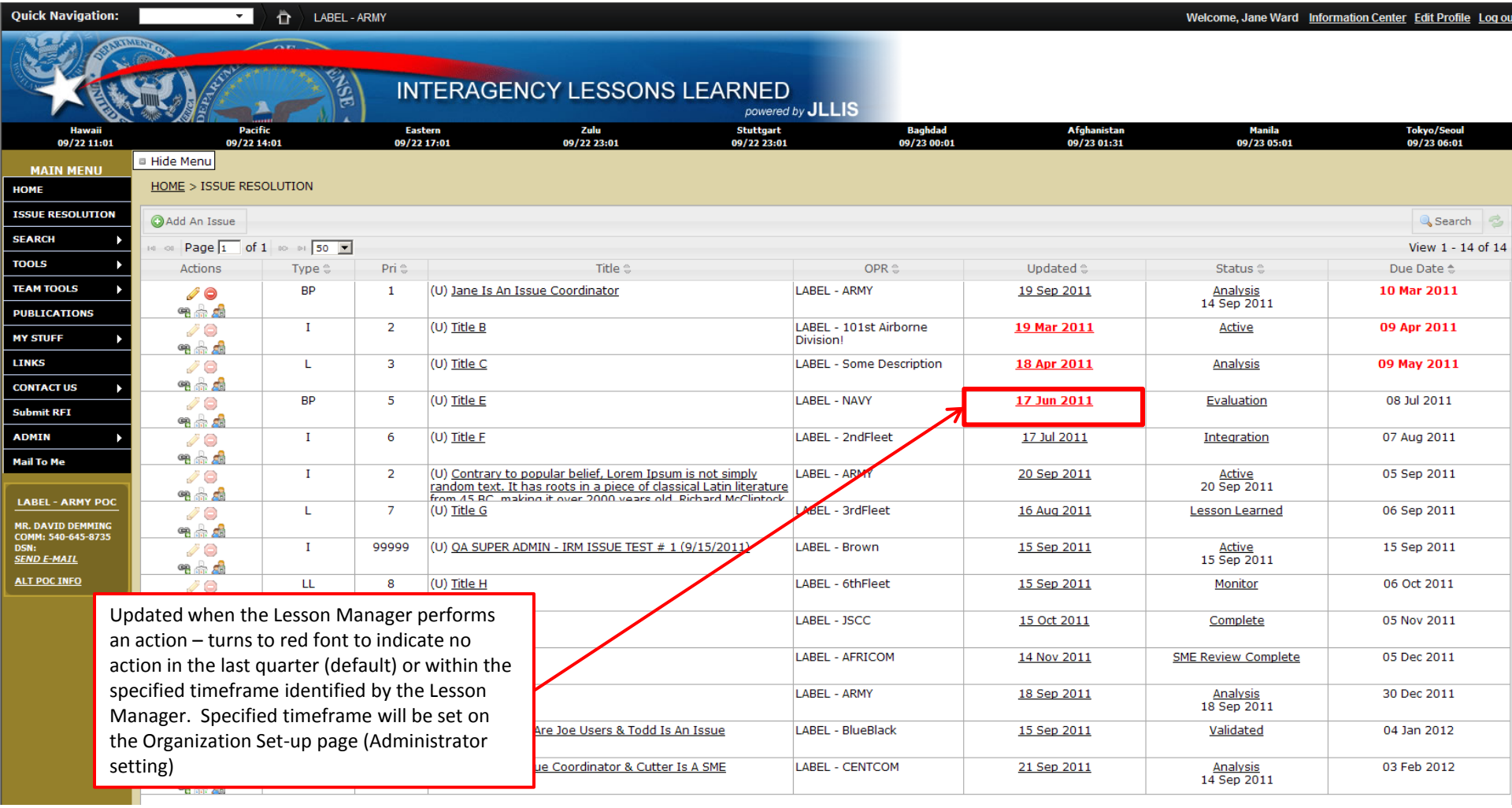
Displays the list of SME with contact information.

JLLIS Issue Management



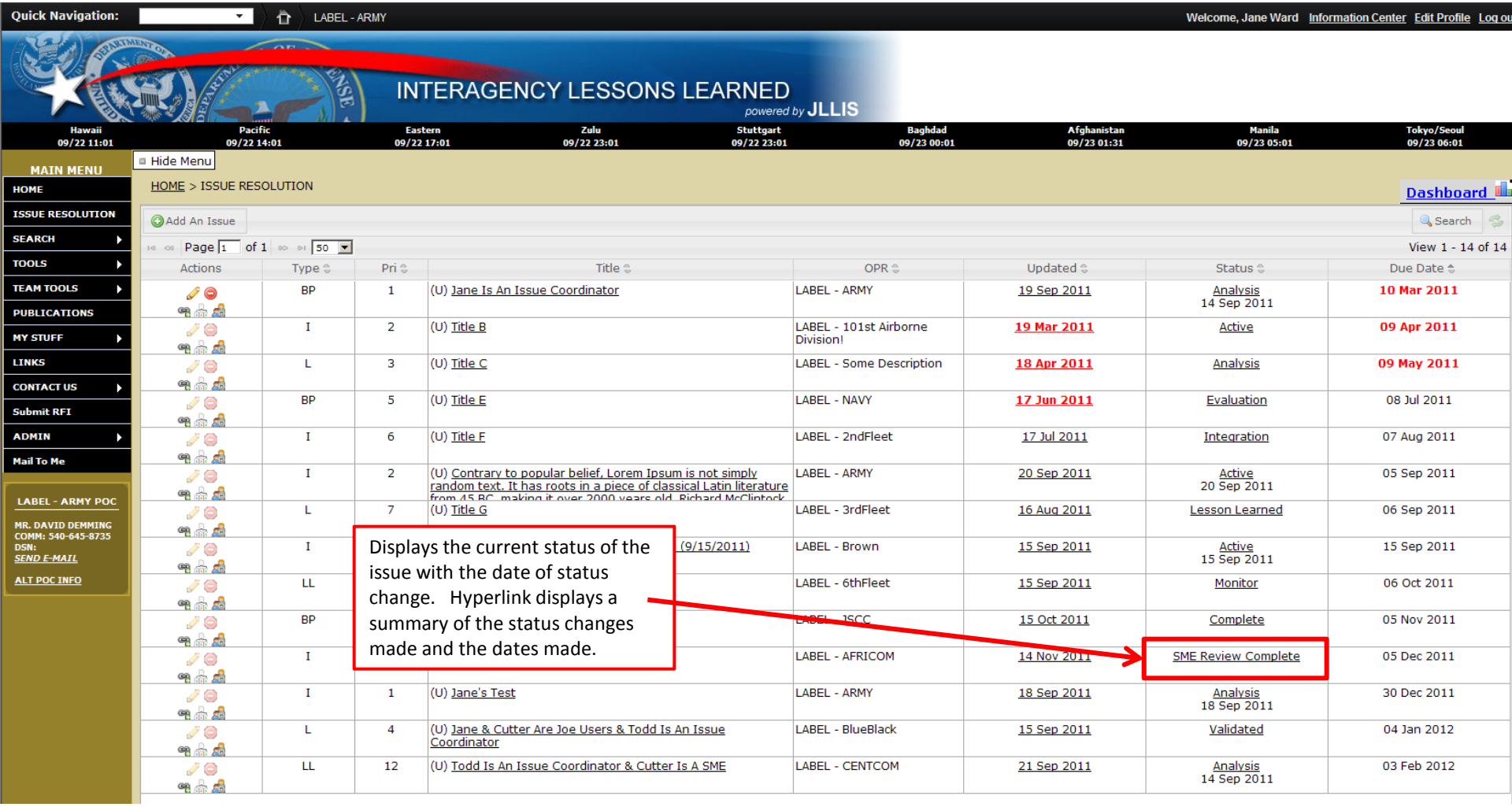
Displays the date last modified and the name and contact information of the Last Modified By user.

JLLIS Issue Management



Updated when the Lesson Manager performs an action – turns to red font to indicate no action in the last quarter (default) or within the specified timeframe identified by the Lesson Manager. Specified timeframe will be set on the Organization Set-up page (Administrator setting)

JLLIS Issue Management



Displays the current status of the issue with the date of status change. Hyperlink displays a summary of the status changes made and the dates made.

ISSUE STATUSES

Active: Default status for all issues.

Analysis – Review and analysis of observations to clarify findings. Ensure observations are complete and relevant during the review phase.

SME Review – SME's identified and issue submitted for review and further analysis, comments, and recommendations.

SME Review Complete – SME coordination and issue review process completed.

Validated – Validation consists of a series of review, analytical and validation activities that convert issues into identified lessons to start the integration process.

Integration – Lesson are integrated with a functional resolution process to ensure that required DOTMLPF changes are addressed and corrective actions identified.

Monitor – Monitoring occurs as lessons work through the integration processes. The Lesson Manager (LM)/Organization Primary Responsibility (OPR) monitor assigned lessons to track their progress through the respective resolution process.

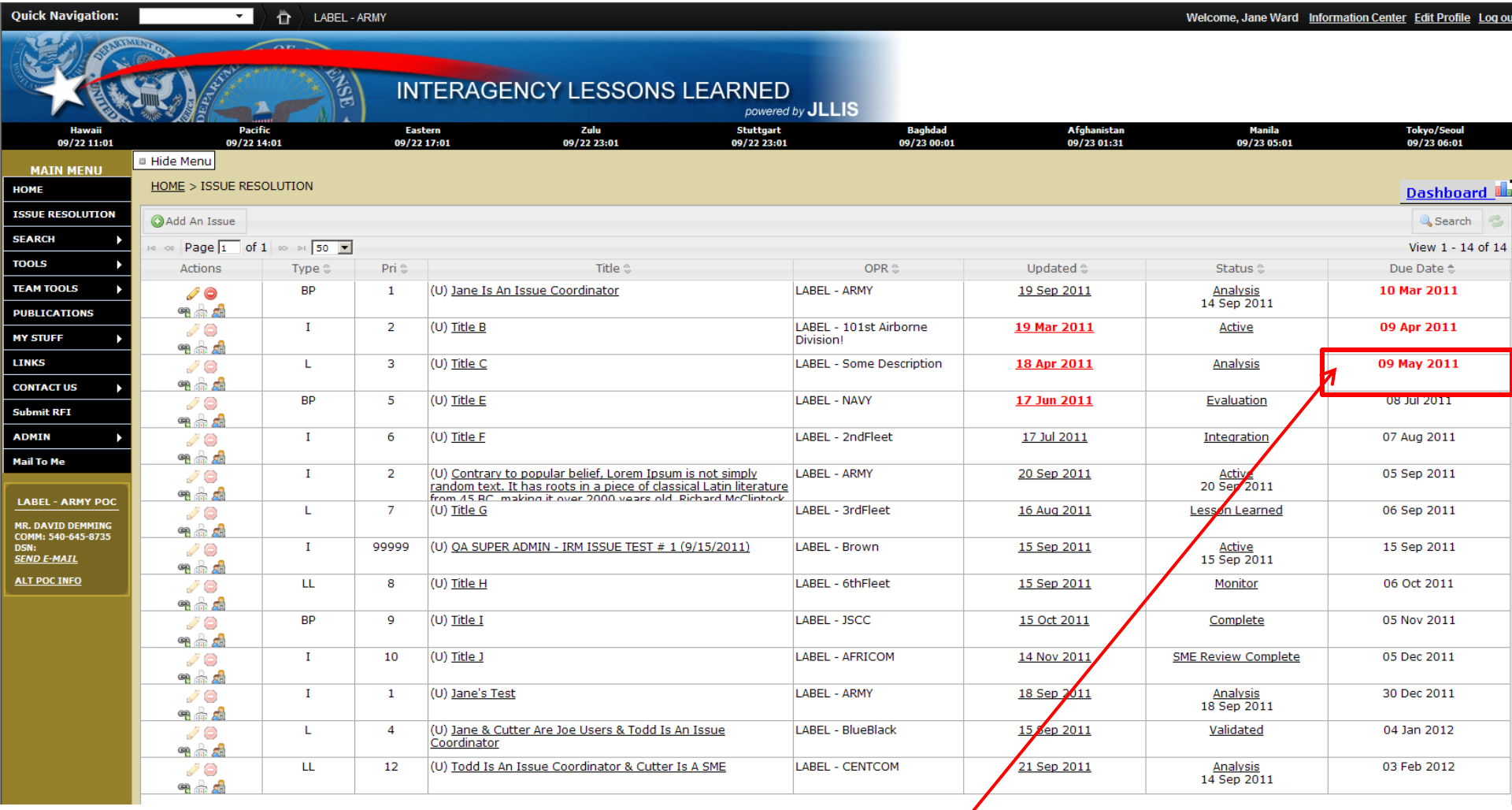
Evaluation – As products and solutions to lessons exit the monitoring process the LM/OPR evaluates the lesson identified to determine if the product from the learning process or solution to a lesson leads to a lesson learned.

Lesson Learned – Lesson determined to be a lesson learned and is published and disseminated to all JLLIS users for further research, analysis, integration, and learning to improve the operational effectiveness of the DOD.

Canceled – Issue Coordinator has canceled the issue/lesson (duplicate, etc.).

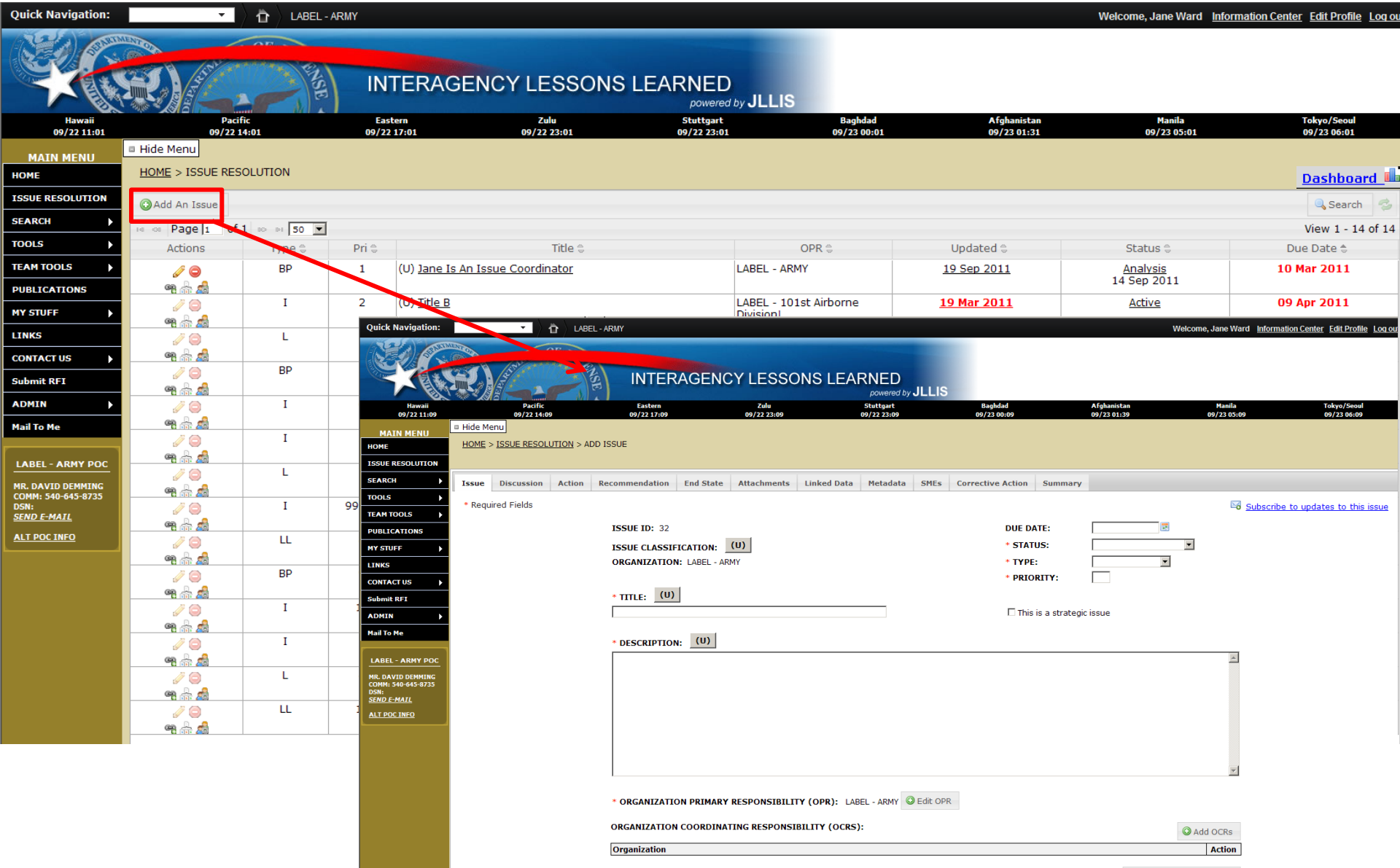
Closed – Issue Coordinator has closed the issue/lesson from further action or analysis.

JLLIS Issue Management

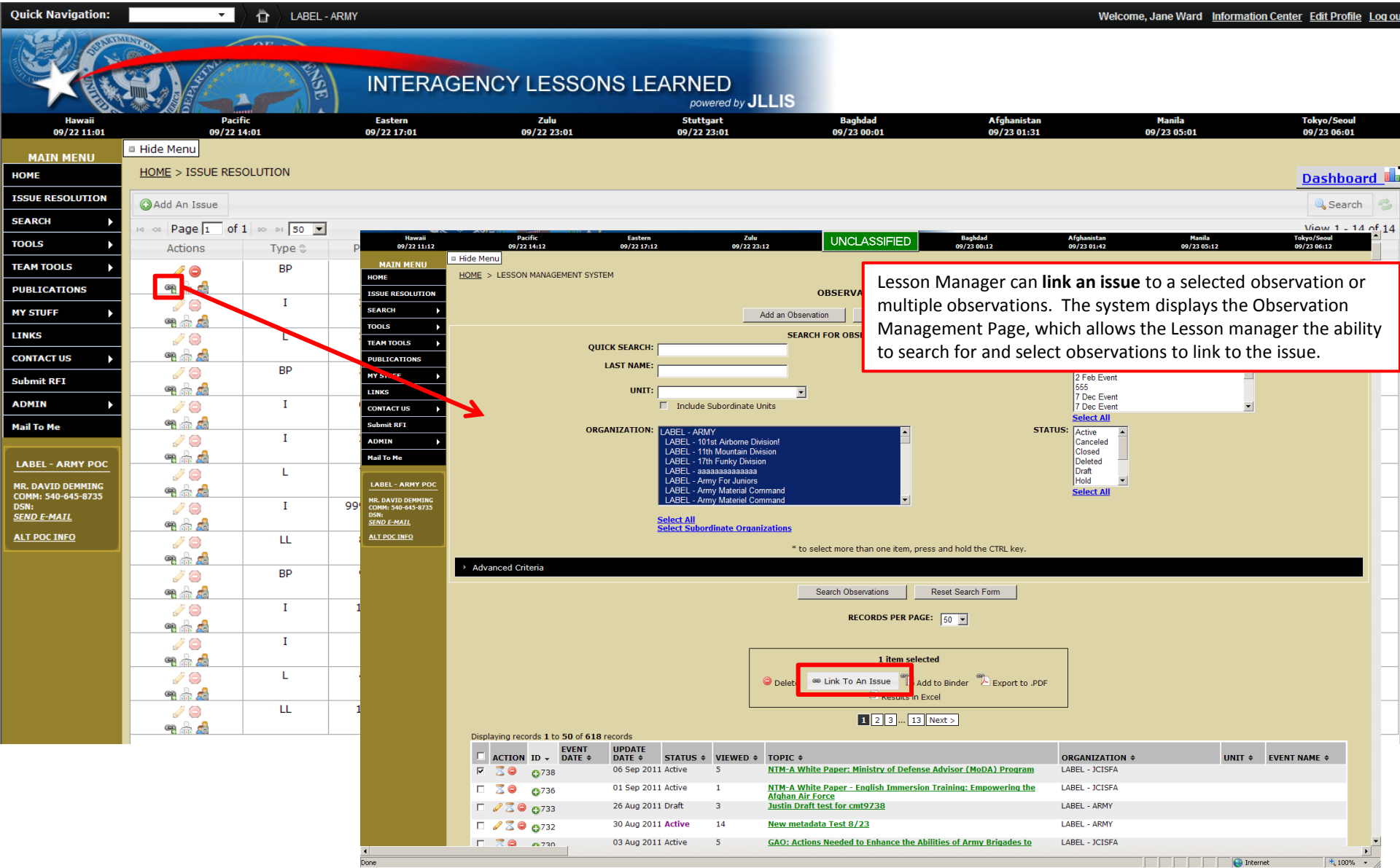


Due date set by the Lesson Manager. Turns to red font when the it goes past the established Due Date.

JLLIS Issue Management

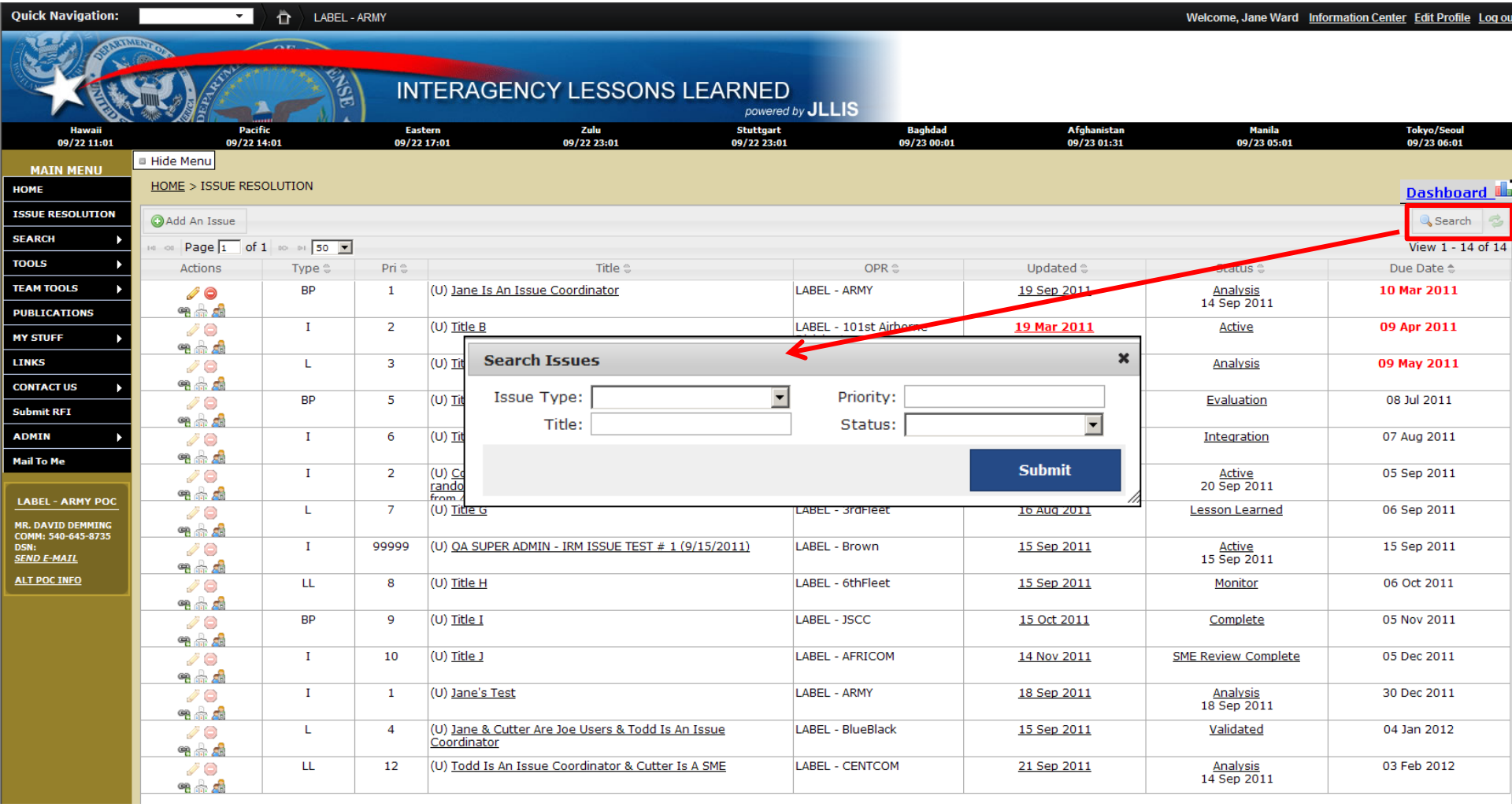


JLLIS Issue Management



Lesson Manager can **link an issue** to a selected observation or multiple observations. The system displays the Observation Management Page, which allows the Lesson manager the ability to search for and select observations to link to the issue.

JLLIS Issue Management



Search feature is available to search Issues by Type, Priority, Title Keyword, or status.

WJTSC 11-1 REQUIREMENTS

BACKUP SLIDES

WJTSC 11-1 REQUIREMENTS

- **Issue Resolution Process**
  - Rename the tab Issue Management vs. Lesson Management **(v2.3)**.
  - Issue Management table should only contain nominated issues. These are observations the Lesson Manager has determined require some issue resolution **(v2.3)**.
  - Update the Observation Form to allow the Lesson Manager the ability to identify the observation as an Issue (checkbox selection) **(v2.3)**.
    - Once saved, the system displays the new issue in the Issue Management table **(v2.3)**
    - Business Rule: If the LM deselects the "Issue" checkbox, the system removes the issue from the Issue Management table as long as no action has been taken with the issue (submitted to SMEs, etc.) **(v2.3)**
  - Add a priority field to the Issue Management Table **(v2.3)**.
  - SME Popup **(v2.3):** Show the POCs assigned organization.
  - Last Modify Date: Any modification made to the issue counts as a modification to include any "perspective" added. **(v2.3)**
  - Issue Statuses:
    - Provide the ability to add comments to statuses. For example, Active with a comment that the issue resolution will take *X* months to validate. Field is required when the status is changed. **(v2.3)**
    - Canceled/Closed issues should not appear in the active (default) Issue Management Table; however, the user will have the ability to select Canceled/Closed from the drop down list to display all "canceled" or "closed" issues. **(v2.3)**
  - Provide the ability to nominate an existing issue as a master issue. Update: The current design allows the LM to make the issue a master issue (via the "link" action icon).

WJTSC 11-1 REQUIREMENTS

- **Issue Resolution Process**
  - Display Master Issue / Child Issue relationships for “linked” issues in the search results **(v2.3)**.
  - **New Requirement (v2.3):** Allow Lesson Managers the ability to set a reminder date to SMEs (i.e. Default to 1 week prior to Due Date).
  - **New Requirement (v2.3):** When the suspense date is “overdue” the system should send an automated email notification to SME’s with outstanding reviews.
    - Email should contain JLLIS URL
    - Email should contain issue information (Title, Description)
    - Email should contain contact information for Issue Lesson Manager (i.e. “If you have questions concerning this email contact the following Lesson Manager:”)
  - **New Requirement (Post Oct):** Provide the assigned user (CLM/SME) the ability to reject/decline the assignment.
    - User must enter comments/reason behind why they are not the right CLM/SME.
    - System sends an email notification to the Lesson Manager.
  - **New Requirement (Post Oct):** Provide the ability to assign SME’s that do not have a JLLIS account.
    - Display a contact information (enter the Name and email address for the non-JLLIS user.
    - System sends an invite email notification to the POC, which outlines instructions to register for an account.
    - Email should contain JLLIS URL.
    - Email should contain issue information (Title, Description).

WJTSC 11-1 REQUIREMENTS

- **Issue Resolution Process**
  - ➢ Issue Subscription: Allow users the ability to subscribe to issues so they receive updated emails/information **(v2.3)**
  - ➢ **New Requirement (v2.3):** Allow Lesson Managers the ability to view issue metrics (other than DOTMLPF) by other customized metadata tag.
    - – Provide a link to display an Issue Metrics Interface.
    - – Display customized metadata tags for the logged in user's organization.
    - – Provide radio buttons to select which metadata tags to include in the metric report
    - – Allow user the ability to output the report in MS Word or MS Excel.
  - ➢ Provide a checkbox to identify if the issue is a "Strategic Issue" **(v2.3)**
  - ➢ Provide an email notification to Issue Coordinators and SMEs when the status of an issues has changed **(v2.3)**
  - ➢Lock the status of observation if linked to issue **(v2.3)**

WJTSC 10-2 REQUIREMENTS

- **Develop a JLLIS Issue Resolution Process (Workflow) – New Module**
  - CMT #7917 - Create an Issue Management Module **(v2.3)**
    - Add Type column to the Lesson Management interface (Observation, Issue, Lesson, Lesson Learned, Best Practice)
    - Display the Lesson ID # (hyperlink that when selected displays the Lesson Summary page)
    - Display the Lesson Topic text
    - Display the Event Date (Date the observation, issue, lesson was entered in JLLIS)
    - Provide Lesson Manager the ability to Add the OPR and OCR for an observation/issue
    - Display the OPR with organization Lesson Manager(s) POC contact information pop-up
    - Display the OCR(s) with Organization information pop-up to display the OCRs assigned
    - Display the assigned SME(s) with POC contact information in a popup
    - Display the Last Modified Date (with the POC information for Last Modified By in a popup)
    - Display the Status with date of status change
    - Display the Due Date (for those statuses with a Due Date)

  - My Stuff **(v2.3)**– Add a link to show issues assigned to logged in SME. The page displays just those issues assigned to the Logged in user (SME). Provide the SMEs the ability to view all Issues (read-only) assigned to their organization as well
  - System should send out an email notification when there is a status change to all assigned POCs (OPR LMs/SMEs) - **(v2.3)**
  - Provide ability for a SME to assign additional SMEs **(v2.3)**

WJTSC 10-2 REQUIREMENTS

- **Develop a JLLIS Issue Resolution Process (Workflow) – New Lesson Management Module**
  - Provide **Action** features to allow the Lesson Manager the ability to:
    - Link an Observation to other Issue(s), Binder(s), or CoP(s)
      - Other Issues **(v2.3)**
      - Binders/CoPs **(Post Oct)**
    - Provide ability to "Link" multiple observations to a single Master (or Parent) issue **(v2.3)**
    - Flag observations that are linked to an issue in the resolution process. This "link" should display when the Observation is returned in Joint Search results **(v2.3)**
    - Provide LM ability to elevate an observation to an Issue, Best Practice, Lesson, or Lesson Learned Type (via the Edit Observation Page) **(v2.3)**
    - Email Lesson Manager(s) or assigned SME(s) **(v2.3)**
    - Coordinate an Issue through the resolution process (Assign and send to SMEs, set Due Dates, Overdue notices, etc.) **(v2.3)**
    - Cancel an Issue **(v2.3)**
    - Complete an Issue **(v2.3)**
    - Release an Issue **(v2.3)**
  - Provide an Issue Approval Process **(Post v2.3)**
    - Assignment of Approver **(Post v2.3)**
    - Approval Workflow **(Post v2.3)**
  - Track a lesson that doesn't need to go through a formal analysis workflow or resolution process **(v2.3)**

WJTSC 10-2 REQUIREMENTS

- **JLLIS Issue Resolution Process - Key Performance Metrics:**
  - Ability to tag Observations, Issues, Best Practices, Lessons **(v2.3)**
  - Ability to tag Key or Essential Inputs – Strategic **(v2.3)**
  - Dashboard/Summary Pages: DOTMLPF **(v2.3)**
  - KPIs/Alerts: Quarterly – No action, etc. Allow the organization Admin to set how often the system sends out an email reminder when an issue has had not action within the specified timeframe. **(Post Oct)**
  - Home Page Metric Views - # of Analysis, Validated, etc. **(v2.3)**
  - Change Font to indicate delay (Overdue) **(v2.3)**

WJTSC 10-2 REQUIREMENTS

- **JLLIS Issue Resolution Process - Reports/Queries**
  - Create a Gantt or other similar views to display the status (POA&M) of issues, observations, lessons, etc. **(Post Oct)**
  - Provide users the ability to select which data to output within selected reports/queries. **(Post Oct)**
  - Provide ability to tag the issue **(v2.3)**
  - .ppt Briefing Views **(v2.3?)**
  - DCR report like format (DOTMLPF Report). Allow users the ability to Save and enter additional elements for future edits. **(Post Oct)**
  - Flag observations that are linked to an issue in the Resolution Process. This "link" should display when the observation is returned in the Joint Search results. **(v2.3)**

WJTSC 10-2 REQUIREMENTS

- **JLLIS Community of Practice (CoP)**
  - Provide the ability to select “Request a Joint CoP” which sends an email request to the JS J7 Coordinator box.
  - Ability to associate an issue to an Internal CoP. Allow Admins the ability to create an Internal CoP at the same time without having to go back to the CoP page.
  - Ability to nominate a CoP to another organization.
  - Provide users the ability to “register” for a Joint CoP for active collection efforts. System would send an email notification to the CoP Manager – “User request to join the XX Joint CoP as a Team Member.”
  - Provide the ability to archive (& reinstate) “Joint CoPs”
  - Provide the ability for a Joint CoP manager to assign members outside his/her organization so these members can post documents, etc.
  - Provide a Hover over Joint CoPs to identify who the CoP manager is with contact information.
  - Provide the ability to create a Collection CoP that doesn’t contain Observations, but only informs the community that the Organization is planning on Collecting down range or in the future. (i.e. SOCOM is conducting analysis on XX in country X six months from now.) Contingency Collection Efforts vs. Active Collection Efforts. Table construct that Administrators/LMs can post to identify future collection efforts.

WJTSC 10-2 REQUIREMENTS

- **JLLIS Additional Requirements**
  - Need a common term of references for the Program
  - Provide the ability to transfer an issue or nominate an issue to another OPR.